



Quick Reference Guide

Outlook 2011 for Mac: Outside the Mailbox – Outlook Data Management



Outlook Data Management

There are ramifications for having a “Large” Outlook mailbox and/or “Large” Outlook main folders. You may experience slow response time when opening Outlook, performance issues such as slow sorting or searching, and the inability to send e-mail if the mailbox size quota is reached. The greater the number of items in a folder (Inbox, Sent Items, Deleted Items, Calendar, etc.), the greater chance Outlook will send multiple requests to the server if the view is changed or the messages are scrolled through. The more times Outlook sends requests for action to the server, the longer time it will take for Outlook to complete the action.

Mailbox Size and Maximum Number of Folder Items Quotas

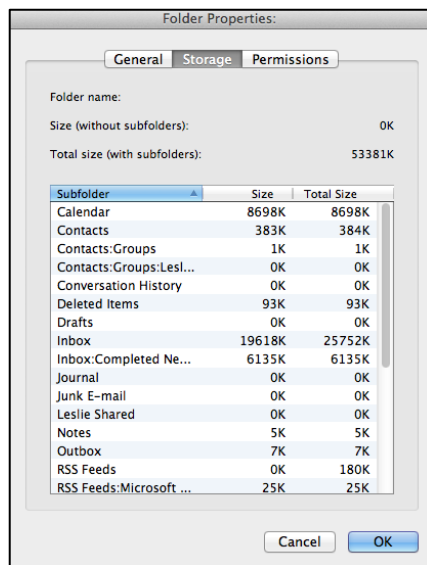
When discussing the size of a user’s Outlook mailbox, we are referring to the folders on the Exchange Outlook Server in your user account, not files stored in the On My Computer folders or in a locally stored Archive.

Mailbox Size: 1 GB Quota

- If the mailbox size reaches **990MB**, the user will receive notifications the mailbox byte count needs to be decreased.
- If the mailbox size reaches **1 GB**, the user can still receive e-mail messages but cannot send e-mail messages.

Check Size of Mailbox

1. In the Navigation Pane, right-click on “NASA.” A shortcut menu displays.
2. Click on **Folder Properties | Storage**. The *Folder Properties* window displays (shown below) and retrieves the folder list with each folder’s size and a total size of your entire Mailbox (including subfolders).



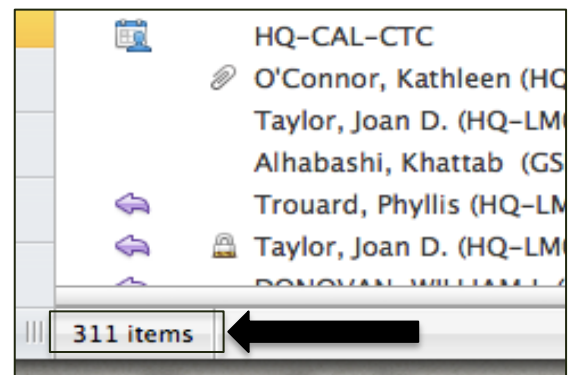
3. Click **OK**.

Folder Items: 10,000 Items Quota

- When a main folder reaches the maximum, user will be contacted by the NOMAD team.
- The maximum of **10,000 items** includes all of the main folders with all their subfolders and contents. The maximum number of items in any of the main Outlook folders should be below **5,000 items**. Ideally, the number should be around **3,500 items** or less for optimum performance.

Check Number of Items in a Folder

1. Highlight the folder in the Outlook Navigation Pane (shown below).
2. The Number of items displays at the bottom.



Create an Archive

An Archive file is created by exporting items. The Archive is then imported back into Outlook to move Outlook items outside of the Outlook Exchange server and outside of the On My Computer folders. On My Computer folders on the Mac are actually still associated with your Outlook profile and very large folders can cause latency issues in Outlook. Using the Archive as your filing system will move the Outlook items off the Outlook Exchange server and thereby decrease the size of your Outlook Exchange mailbox. The following are the steps we will discuss:

1. Create a category to identify the items to be exported.
2. Apply the category to the Outlook items to export.
3. Export by the category.

Create a Category to Identify Items to be Exported

The Category can be used for sorting, filtering or searching. Categories can be applied to any Outlook item type.

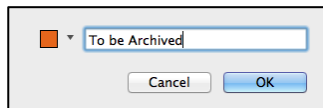
Access Categories List

1. From the Mail, Contacts, Tasks and Notes main folder view: click **Home Tab | Categorize**. A *Category drop-down menu* will display (shown upper right).
2. From the Calendar: click **Organize Tab | Categories**. The *Categories* window displays (shown lower right).

Create a Category

1. From the Mail, Contacts, Tasks and Notes main folder view: click **Home Tab | Categorize**. The *Categories List* displays (shown upper right).
2. Click **Add New** or click **Edit Categories**. A dialog box displays with fields to select a color and enter a name for the category (shown below).

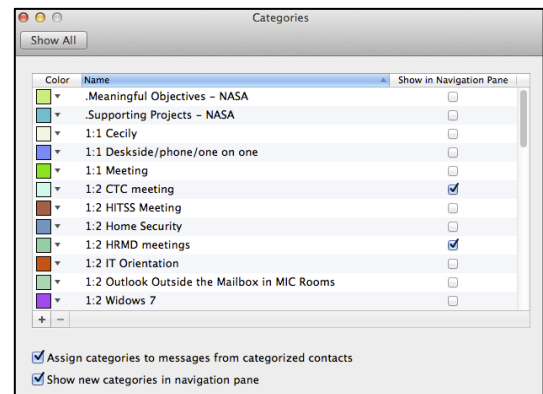
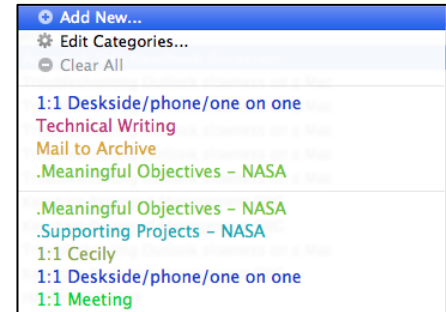
From the Calendar, click the plus sign button (at the bottom of the Categories list). The dialog box displays with fields to select a color and enter a name for the category (shown below).



3. Select the Category color from the drop-down list and type a name for the Category.
4. Click **OK**.

Apply Category to the Outlook Items to Export

1. From the main folder (Inbox, Contacts, Tasks, and Notes) view: highlight the item to be exported and click **Home Tab | Categorize** or right-click and click **Categorize**. The *Category drop-down menu* displays with the list of Categories. Click on the Category in the list to apply it.
2. From the Calendar: highlight the item to be exported and click **Organize Tab | Categories**. The *Categories* window displays. Click on the Category in the list to apply it.
3. From within the Outlook item: click **Categories**. The *Category drop-down menu* displays with the list of Categories. Click on the **Category** in the list to select it.



Export By Category

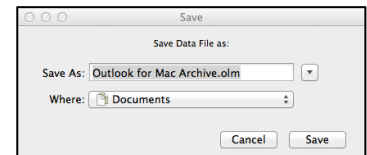
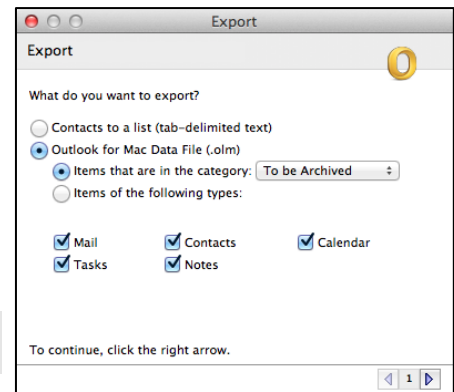
1. Click **File menu | Export**. The first *Export* dialog box displays (shown right).
2. Click to select **Outlook for Mac Data File (.olm)** for the **What do you want to export** option.
3. Click to select **Items that are in the category** and click the **drop-down arrow** for the available Category list.
4. Click to select the **Archive** category used to identify the items to be archived.
5. Ensure the correct Outlook main folders are selected that have items to be exported. Click to enable/disable **Mail, Contacts, Calendar, Tasks** and/or **Notes**.

FYI ... The more folders the Export has to search, the longer the Export will take.

6. Click the **Right Arrow** (bottom right corner) to continue. The second *Export* dialog box displays (shown right).
7. When prompted, **Do you want to delete items from Outlook after they are exported** do one of the following:
 - a. Click to select **No, do not delete items** to make a copy of the exported items in a separate *.olm file.
 - b. Click to select **Yes, delete items after they are exported** to export and remove the exported items in one step.

Ensure the checkbox is enabled for If exporting a category, do not delete items also belonging to another category. This will ensure any item with the archive category and another categorized applied will be skipped in the export process.

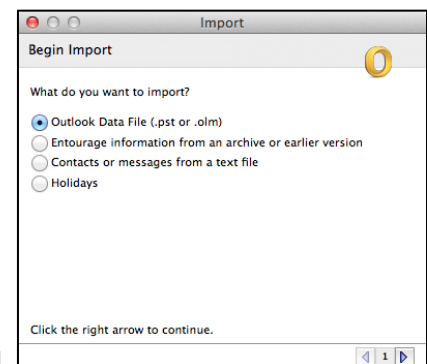
8. Click the **Right Arrow** (bottom right corner) to continue. The *Save* dialog box displays (shown right).
9. Type a name for the file in the **Save As** field.
10. Select the storage location in the **Where** field.
11. Click **Save**. Outlook will begin exporting your data.
12. When completed, the Export Complete screen displays. Click **Done**.



Import an *.olm File into Outlook

1. Click **File menu | Import**. The *Begin Import* window displays (shown right).
2. At the prompt "**What do you want to import,**" click to select **Outlook Data File**, then click the **Right Arrow** (bottom right corner) to continue. The *Choose a File Type* window displays.
3. Click to select **Outlook for Mac Data File (.olm)**. Click the **Right Arrow** (bottom right corner) to continue. The *Import* dialog box displays prompting to browse and locate the file to be imported.
4. Browse to the file location, click to highlight the file and click **Import**. Outlook will begin importing your data.
5. When completed, the Export Complete screen displays. Click **Done**.

The imported Archive displays in the On My Computer section of the Navigation Pane.

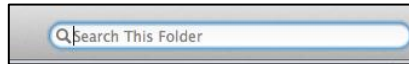


Search Outlook Items

You may wish to search Outlook for items to be deleted or categorized for export.

Basic Search

1. In the upper right corner of the Outlook window, click into the **Search This Folder** box in the **Standard Toolbar**.




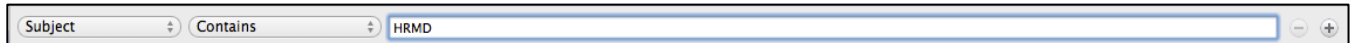
A **Search Tab** and Ribbon displays.



2. Search folder options:
 - a. By default, Outlook searches in the selected **Folder**. Click **Subfolders** on the **Search** Ribbon to search within Subfolders.
 - b. Click **All Mail** to search all e-mail folders.
 - c. Click **All Items** to search appointments, contact cards, tasks etc. along with e-mail.
3. The search result will display.


Advanced Search

1. In the upper right corner of the Outlook window, click into the **Search This Folder** box in the Standard Toolbar. The **Search** tab displays (shown above).
2. Click a scope button on the Search tab, such as **Subfolders**, **All Mail** or **All Items**.
3. Click  **Advanced**. The **Advanced Search** displays above the displayed folder.



4. Define your first criterion by clicking the **Contains drop-down arrow**, and then click a field to search within.
5. The contains operator will be used by default. Click the operator drop-down arrow to select from the list.

Note The available search criterion are specific to where you are within Outlook, such as Mail, Calendar, Contacts, Tasks, and Notes.

6. Click  the **Plus** sign to add a second criterion. Click the **Minus** sign to delete a criterion. The search results display automatically once a criterion is entered.
7. After reviewing the search results, click **Close** on the **Search** tab.

Smart Folders (Search Folders)

1. **Smart Folders** are Outlook pre-defined searches accessible in the Navigation Pane. They are as follows:
 - a. **Flagged Mail**: filters by messages that have been flagged;
 - b. **High Priority Mail**: filters by messages marked high priority in the e-mail options; or
 - c. **Overdue Mail**: filters by messages that have expired based on information in the e-mail options;
2. To create a **Smart Folder** (saved search):
 - a. Build the search criterion and run the search.
 - b. Click **Search** tab | **Save**. The search displays under **Smart Folders in the Navigation Pane** labeled "Untitled."
 - c. Click on it in the Smart Folders list and type the desired search name.
 - d. Press **ENTER** on the keyboard to accept the name.

To Get Help

- For questions, contact the CTC at 358-1111.
- Official NOMAD training materials and documentation: <http://nomad.nasa.gov/nomad/documentation.html>.
- Provide suggestions or corrections to NOMAD materials: NOMAD.Outreach@nasa.gov.
- For assistance, contact the Enterprise Service Desk (ESD): Submit a ticket online at <https://esd.nasa.gov>; or call 358- HELP (4357).